

SURVEYS OF CONSUMER ATTITUDES



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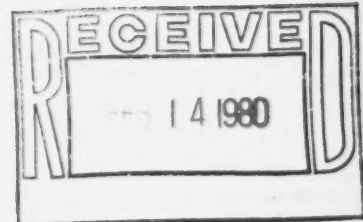
THE RV CONSUMER:
CURRENT TRENDS AND FUTURE PROSPECTS

by

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Introduction

This presentation contains both favorable and unfavorable indications for future recreation vehicle sales. In short, the unfavorable news involves a continuation of the RV sales slump through 1980; the favorable news indicates that demand for recreation vehicles is likely to increase during the next decade, provided the necessary improvements in gasoline mileage can be achieved.

The economy has now entered its third recession since 1970, and the decline in consumer sales will extend until mid-1980. Double-digit inflation and double-digit interest rates have severely depressed consumer spending, especially for large discretionary purchases such as houses, cars, and recreation vehicles. Moreover, since the price and availability of gasoline has played a central role in our developing economic problems, RV sales have suffered greater declines than would be expected based just on changes in consumer incomes. Increases in the price of gasoline have greatly increased the cost of using RV's; importantly, gasoline shortages and uncertainty about its availability has made the RV unattractive regardless of the cost of gasoline. Although housing and car sales are expected to start a slow rebound in mid-1980, because of continued uncertainty about the price and availability of gasoline, RV sales are not likely to show renewed strength until late 1980 or 1981.

It is thus appropriate and necessary to now embark on a long term strategy in response to the energy crisis and declining sales. Future RV sales will depend both on the type and characteristics of the RV's supplied for sale, as well as the nature and extent of consumer demand. In this presentation I will focus exclusively on trends in consumer demands.

The proper setting in which to consider demand for RV's is in the context of the household. It is the combination of the preferences and needs of each household member that determines the type and size of the RV chosen. The type and number of vehicles owned by the household is important because some RV's must be towed by another vehicle, while motorhomes and vans can substitute for a household vehicle.

Much is unknown about the RV consumer. Who owns RV's? What types of vehicles do they own? In what ways is the RV used? An ongoing representative sample survey of American households is being conducted by the Survey Research Center to answer these questions and thus assess the current and future market potential for RV's. This survey was commissioned by the Recreation Vehicle Industry Association, Marketing Analysis Committee. John Agno, the Chairman of this Committee, and John Keaton, the RVIA Staff Marketing Administrator, provided the incentive and guidance for this survey.

The survey addressed three important questions. First, how many families own RV's in the U.S.? How does ownership vary with household characteristics such as income, age, family size, and location? Second, how frequently do owners use their RV's? Is the recreation vehicle used more or less than expected at purchase? Are the RV's also used for non-recreational purposes, such as travel to work? Third, what type of people intend to purchase or rent an RV in the next 12 months? The answers to these questions can help sharpen the focus of your marketing strategies in the near term, and point toward the prospects for increasing demand in the decade ahead. The data which I will report to you today represent preliminary findings from the surveys conducted between May and October

1979. As the research progresses over time, we will increase our ability to track and forecast changes in consumer demand.

The RV Consumer

For the purpose of this household survey, a recreation vehicle was defined and limited to motorhomes, vans, travel trailers, fifth-wheel trailers, fold-down camping trailers, and slide-in truck campers, which have permanent built-in sleeping spaces. This definition thus excludes all vehicles not primarily intended for recreational use. As of mid-1979, 8.5 percent of all vehicle-owning households owned one or more recreation vehicles (7.4 percent of all households owned an RV, including those households without any vehicles). Travel trailers were the most prevalent type of recreation vehicle, accounting for 32 percent of all recreation vehicles owned by households (see Table 1). Slide-in truck campers were the next most frequently owned, representing 20 percent of all recreation vehicles. Motorhomes accounted for 16 percent of the total, nearly equal to the 18 percent represented by vans. Fold-down camping trailers were the least frequently owned recreation vehicle (14 percent).

The features and characteristics of these recreation vehicles indicated that motorhomes and travel trailers were equipped with almost all available features, although travel trailers were less likely to have air conditioning (see Table 1). In contrast, few vans were equipped with cooking areas, bathroom facilities or separate heating and cooling. In fact, slide-in truck campers were more frequently equipped with these features than vans. For all features, slide-in truck campers were nearly comparable with motorhomes and travel trailers, except for bathroom facilities and air conditioning.

About four in ten of these recreation vehicles were purchased new; the majority being purchased used. The use of credit was widespread: one in every two motorhomes and vans were purchased with credit, while one in three travel trailers or slide-in campers were purchased with credit.

Table 2 gives the overall ownership among population subgroups for all recreation vehicles. For each subgroup two figures are shown: the "ownership rate" is the proportion -- or percentage -- of households in a given subgroup which own a recreation vehicle as of mid-1979; the column labeled "share of all RV's" gives the percentage -- or the market share -- of all RV's which are now owned by that particular subgroup. For example: among families who live in the Western states, 13.1 percent own a recreation vehicle; when all families living in the West are taken together, they account for 32 percent of all the recreation vehicles owned. The ownership rate is substantially lower among families who live in the South -- at 7.9 percent it is about two-thirds the 13.1 percent recorded in the West. Yet because more people live in the Southern region in comparison with the West, both the West and Southern region each account for about 30 percent of all RV's. Both figures are important for marketing decisions since the ownership rate gives the likelihood that households in any particular subgroup own RV's, while the percentage share indicates the size of the market.

Tables 3 to 7 give similar information for each type of recreation vehicle. These data may be highlighted as follows.

Motorhomes. Overall, motorhomes were owned by 1.4 percent of all vehicle-owning families in the United States as of mid-1979 (Table 3). Motorhomes were significantly more likely to be the third or fourth vehicle

owned by the household; they were rarely the only or the second vehicle the household owned. Of all motorhomes owned by households, two-thirds were owned by households with three or more vehicles. Families residing in the Western region of this country were twice as likely to own a motorhome than residents of any other region, yet because of the relative size of the Western region, it accounted for just one-third of all motorhomes owned. The Southern region, with a much lower ownership rate but larger population, also accounted for one-third of all motorhomes. The Northeast had the lowest ownership rate and accounted for the smallest number of motorhomes -- just 10 percent of the total.

As expected, ownership rates of motorhomes increased with family income. The relationship was uneven, however. Very few families with incomes below \$15,000 owned motorhomes. Of all motorhomes owned, 40 percent were owned by families with incomes of \$15,000 to \$25,000, and 40 percent were owned by families with incomes of more than \$25,000. Those earning under \$15,000 accounted for less than 20 percent of all motorhomes. Ownership rates increased steadily with age up to age 65. More than half (55 percent) of all motorhomes were owned by respondents in the 45 to 64 age groups. Ownership rates were highest among respondents with an intermediate level of education -- those with a high school diploma plus those with some college training. The rate of ownership is as low for those who did not complete high school as for those who were college graduates. Families with no children under age 18 living at home were less likely to own motorhomes. However, since most households do not include children, 61 percent of all motorhomes were owned by families with no young children at home. In comparison, just 12 percent of all motorhomes were owned by families with three or more children.

Vans. Among all vehicle owning households, 1.5 percent reported owning a van permanently equipped for recreation purposes (Table 4). The ownership pattern for vans and motorhomes were similar in many respects. There were several important differences, however. Vans, in comparison to motorhomes, were more frequently owned by families with two or fewer vehicles. Van ownership was more concentrated in the Western region than motorhomes. The frequency of van ownership declined with age; the highest frequency of ownership occurred in the 25 to 34 age group. Of all vans, 46 percent were owned by those under age 35 -- compared to just 20 percent for motorhomes. Van ownership was somewhat more frequent than motorhome ownership among families with children living at home. Nonetheless nearly half (47 percent) of all vans were owned by families with no children at home. As with motorhomes, the frequency of van ownership increases with family income, rising from just one-half of one percent among those with incomes of less than \$10,000 to 2.7 percent among those with incomes of \$25,000 or more.

Travel Trailers. Travel trailers were owned by 2.9 percent of all vehicle-owning households in 1979 (Table 5). Ownership of a travel trailer or fifth-wheel trailer increased sharply with the total number of vehicles owned by the household. Among households with just one vehicle, less than one percent also owned a travel trailer. Among families with two vehicles, four percent owned a travel trailer, which rose to 5.3 percent among families with three vehicles, and 5.9 percent among families with four or more vehicles. However, the majority of all travel trailers were owned by families with two vehicles or less, because of their large numbers.

For motorhomes and vans, ownership rates increased as income rose. In contrast, for travel trailers, the ownership rate was highest in the middle income groups, especially between \$15,000 and \$25,000. Like motorhomes but unlike vans, ownership rates for travel trailers increased with age to a peak rate of five percent for those age 65 and older. And similar to motorhomes, half of all trailers were owned by those aged 45 to 64 (55 percent). As with motorhomes, travel trailers were more often owned by families with no young children at home (61 percent).

Fold-Down Camping Trailers. Among all vehicle-owning households in 1979, 1.4 percent reported ownership of a fold-down camping trailer (Table 6). Unlike the ownership pattern for all other RV's, significantly fewer residents of the Western region owned fold-down camping trailers in comparison to all other regions. Residents of the North Central region posted the highest rate of ownership. More than one-third of all fold-down camping trailers are owned by households in the North Central states, compared with just 13 percent among Western residents. Ownership of fold-down camping trailers was also distinctive in terms of income and age. The highest rate of ownership was in the upper-middle income group, and among middle aged households. Ownership rates for fold-down campers rose from less than one percent among those under age 25, to more than three percent for those aged 35 to 44, and then subsequently declined among older age groups. More so than other RV's, fold down camping trailers were owned by families with young children living at home. Families with children accounted for 75 percent of all fold-down camping trailers.

Slide-In Campers. Among all vehicle owning households 1.8 percent reported ownership of slide-in truck campers (Table 7). The ownership

rate of these campers was strongly related to the number of vehicles the household owned. Among households with just one vehicle, less than one-half of one percent owned a camper, rising to 7.2 percent of all families owning four or more vehicles. The Western region had significantly higher ownership rates reflecting more frequent ownership of pick-up trucks. Like fold-down camping trailers, the highest rates of ownership occurred in the middle income groups and middle age range.

Frequency and Type of Use

Sound market strategy requires knowledge of how people use their RV's, so that sales gains can be built on positive feedback from current owners. To assess the extent of use, respondents were asked about the total number of days each RV was used for recreation during the last 12 months. On average households used each RV 25 days during the past 12 months (Table 8). The various types of RV's differed significantly in the extent of their use. Fold-down camping trailers were used on average just 11 days during the past year, travel trailers were used on average 22 days, and vans and motorhomes were used on average for 33 days. Interestingly, more than one in four travel trailers, fold-down camping trailers, and slide-in campers were not used at all for recreation during the past 12 months.

How does this level of usage compare with the expectations held when the RV was purchased? Overall, 49 percent reported that they used their recreation vehicle less than expected, compared with just 21 percent who felt they used their RV more than they had originally expected; 30 percent reported that they used their vehicle as much as they had originally expected. Among owners who felt they used the RV less than they had

originally expected, they actually used their RV on average for 14 days, significantly below those who reported about the same or more than expected use (Table 9). The most frequent answer given when asked why the RV was used less than expected was the lack of available time for recreation. Importantly, however, one in five RV owners who used their vehicles less than expected cited problems associated with the price and availability of gasoline.

Fewer, if any, differences in the number of days RV's were used were documented across the several demographic and regional classifications. In almost every demographic grouping, RV's were used between 20 and 30 days on average during the past 12 months. A major exception was RV owners who were over 65 years old; they used their vehicle for 43 days on average. Interestingly, although there are sharp differences in ownership across regions, owners who live in the Western states used their RV for 26 days on average, not significantly above the 21 days recorded by owners in the Northeastern states (Table 10).

When asked whether the RV was also used at work, for household errands, or to transport more people than they could in a regular car, vans and motorhomes proved to be the most versatile. The RV was used at work or for travel to work by 51 percent of van owners and 31 percent of motorhome owners; using their RV for household errands was reported by 55 percent of van owners and 25 percent of motorhome owners; and transporting more people than possible in a regular car was reported by 63 percent of van owners and 36 percent of motorhome owners. Importantly, the frequency of multiple uses of RV's was highest among those under age 35 (Table 10).

The Sales Outlook for 1980

The sales outlook for RV's depends on three different types of influences: a) replacement demand among current owners, b) purchase intentions among nonowners, and c) rental demand.

All current owners of recreation vehicles were asked whether they would purchase another recreation vehicle if -- and when -- they replace their current one. In response, six in ten owners stated that they would buy another recreation vehicle, while 11 percent stated they would replace this recreation vehicle with a regular car or truck, and 17 percent stated they would not replace the RV at all. Most owners stated they would replace their current RV with a similar type in the future. For motorhomes, most preferred to purchase another motorhome (44 percent), although some would choose vans instead (11 percent). Among current van owners, although the majority would still purchase another van (38 percent), there was a greater shift toward motorhomes (17 percent) than any other type of RV. Only for fold-down camping trailers and slide-in truck campers did current owners more frequently prefer another type of RV than they currently owned; travel trailers were more frequently preferred by their owners than any other type of RV (Table 11).

Overall, more than two in three owners currently own an RV similar in type to the first RV they ever owned. This holds true for all RV types except motorhomes, where just 36 percent of current motorhome owners initially purchased motorhomes. Ownership of a slide-in truck camper holds important implications for upgrading at a later date. Among all current motorhome owners, fully 25 percent initially owned a slide-in camper, of all travel trailer owners, 20 percent initially owned a slide-in camper, and of all

fold-down camping trailer owners, 25 percent first owned a slide-in truck camper (Table 11).

To assess the potential demand for recreation vehicles in the near term, households were also asked whether they intend to buy a recreation vehicle during the next 12 months. Among all households, nearly five percent said that the chances were even or better that they would purchase an RV. During the months of May through October 1979, the proportion who intended to make a purchase ranged from three to seven percent (Table 12b). When asked why they would not consider purchasing an RV during the upcoming year, respondents most frequently mentioned that they didn't need or wouldn't use an RV. Nearly half of all respondents, however, mentioned reasons associated with purchase price or fuel economy (Table 13).

In addition to purchase intentions, nonowners were asked whether they would consider renting a recreation vehicle during the next 12 months. In response, nearly 12 percent said they would consider renting an RV in the upcoming year -- nearly three times the proportion who expected to buy. As with purchase intentions, rental intentions increased somewhat following early summer low readings (Table 12a).

Table 14 details the proportion of households who intend to rent or purchase a recreation vehicle within several demographic subgroups. As shown, among households who own just one vehicle, 10 percent expect to rent an RV compared with 16 percent among households with four or more vehicles. Similarly purchase intentions rise from 3.5 percent of all families owning just one vehicle to 7.1 percent among families with four or more vehicles. Purchase and rental intentions were highest among residents of the Western states, and lowest in the Northeast. Purchase

and rental intentions increase with the level of family income, and as the age of the household head increases, purchase and rental intentions decrease markedly; these intentions are also much higher among families with children than without.

The Outlook for the Decade Ahead

The near term outlook for RV sales is unfavorable. Nonetheless, the survey data can help to sharpen the focus of your marketing strategies so as to maximize your sales effort, even in a sluggish market. In the longer term, improvements in fuel efficiency must first take place. Given these improvements, the demand for recreation vehicles will grow in the future mainly in response to the changing age structure of the population.

Overall, the ownership of any type of RV increased along with the age of the household head. Only three percent of households with heads under age 25 owned an RV, compared with more than 12 percent among those aged 35 to 44. From age 45 to 65, about 10 percent reported ownership; the ownership rate then drops to just 5 percent after age 65. Consequently, the baby boom generation, now aged 25 to 35, will move into significantly higher purchase rate age categories during the coming decade. This represents a very favorable prospect for the future of RV sales.

The ownership of different types of RV's, in addition, appears to follow a life cycle pattern. The highest ownership rate for vans occurred among those aged 25 to 34, for fold-down camping trailers and slide-in campers the peak rate occurred at age 35 to 44, and for travel trailers and motorhomes, the peak rate occurred at ages 55 to 64. This implies a shifting as well as an expanding demand in the coming decades.

In conclusion, as an economist, I can forecast a potentially strong demand for RV's in the decade ahead, but I cannot predict which companies and dealers will quickly and profitably adapt to the changed energy circumstances. That is up to you!

TABLE 1

CHARACTERISTICS OF RECREATION VEHICLES OWNED BY U.S. HOUSEHOLDS, 1979

	Type of Recreational Vehicle					
	All Recrea- tion Vehicles	Motor- homes	Vans	Fifth Wheel & Travel Trailers	Fold-Down Camp- ing Trailers	Campers
Percent who own ^a	8.5%	1.4%	1.5%	2.9%	1.4%	1.8%
Share of RV's by type	100%	16%	18%	32%	14%	20%
Cases ^b (unweighted)	528	82	94	159	80	103
<u>Physical Characteristics of RV's</u>						
Permanent cooking area	77%	79%	30%	98%	75%	85%
Running drinking water	72	81	41	89	53	77
Separate heater	59	74	22	82	33	63
Separate air conditioner	28	63	24	35	2	10
Electricity	71	80	33	85	63	79
Toilet facilities	66	83	34	86	30	74
Refrigerator or ice box	84	87	64	95	75	90
Propane gas	76	77	29	97	74	84
Shower or bathtub	41	73	16	66	2	24
Average number of sleeping spaces	4.3	5.3	2.5	4.8	5.3	3.7
Average length (feet)	18.5	24	15	20.7	11.8	NA
<u>Purchase Characteristics of RV's</u>						
Percent purchased new	40%	40%	42%	43%	40%	32%
Percent purchased with credit	41	56	59	35	34	29
Percent using RV trade-in	22	30	30	23	8	17

* Less than 0.5 percent.

NA = not available.

^a Among all vehicle owning households.^b The number of vehicles do not sum to 528 since 10 recreation vehicle types were not ascertained. Many are identified as trailers but the type of trailer is not known.

TABLE 2

OWNERSHIP OF RECREATIONAL VEHICLES AMONG U.S. HOUSEHOLDS, 1979

	<u>Cases</u>	<u>All Recreational Vehicles</u>	
		<u>Ownership Rate</u>	<u>Share of all RV's</u>
<u>All Families</u>	5208	8.5%	100%
<u>Number of Vehicles</u>			
1	2038	1.9	10
2	2241	10.1	47
3	633	19.2	28
4 or more	295	22.8	15
<u>Region</u>			
West	1040	13.1	32
North Central	1517	7.9	25
Northeast	982	5.7	13
South	1661	7.9	30
<u>Income</u>			
Less than \$10,000	913	4.1	12
\$10,000-14,999	881	6.3	14
\$15,000-19,999	1087	10.5	25
\$20,000-24,999	841	10.9	17
\$25,000 and over	1486	11.6	32
<u>Age</u>			
Younger than 25	494	3.2	3
25-34	1622	7.8	21
35-44	1067	12.7	24
45-54	786	10.1	22
55-64	691	10.0	22
65 or older	512	4.7	8
<u>Education</u>			
Less than high school	812	7.6	19
High school diploma	1919	10.5	46
Some college	1251	7.8	20
College degree	1182	6.8	15
<u>Number of Children</u>			
None	2750	7.3	49
1	911	9.9	21
2	944	8.7	15
3 or more	603	13.1	15

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TABLE 3

OWNERSHIP OF MOTORHOMES AMONG U.S. HOUSEHOLDS, 1979

	Cases	Motorhomes	
		Ownership Rate	Share of all Motorhomes
<u>All Families</u>	5208	1.4%	100%
<u>Number of Vehicles</u>			
1	2038	*	3
2	2241	0.1	29
3	633	5.9	42
4 or more	295	6.1	26
<u>Region</u>			
West	1040	2.4	31
North Central	1517	1.2	27
Northeast	982	0.8	10
South	1661	1.1	32
<u>Income</u>			
Less than \$10,000	913	0.3	6
\$10,000-14,999	881	0.5	11
\$15,000-19,999	1087	2.0	26
\$20,000-24,999	841	1.7	14
\$25,000 and over	1486	2.4	43
<u>Age</u>			
Younger than 25	494	0.7	8
25-34	1622	0.6	12
35-44	1067	1.6	18
45-54	786	1.8	24
55-64	691	2.6	31
65 or older	512	1.1	7
<u>Education</u>			
Less than high school	812	1.1	11
High school diploma	1919	1.6	45
Some college	1251	1.4	25
College degree	1182	1.1	19
<u>Number of Children</u>			
None	2750	1.4	61
1	911	1.8	20
2	944	0.7	7
3 or more	603	1.5	12

*Less than .05 percent.

TABLE 4
OWNERSHIP OF VANS AMONG U.S. HOUSEHOLDS, 1979

	Cases	Vans	
		Ownership Rate	Share of all Vans
<u>All Families</u>	5208	1.5%	100%
<u>Number of Vehicles</u>			
1	2038	0.4	11
2	2241	1.6	41
3	633	3.6	30
4 or more	295	4.5	18
<u>Region</u>			
West	1040	2.7	37
North Central	1517	1.6	28
Northeast	982	0.5	12
South	1661	1.4	23
<u>Income</u>			
Less than \$10,000	913	0.5	10
\$10,000-14,999	881	1.0	10
\$15,000-19,999	1087	1.8	29
\$20,000-24,999	841	1.8	13
\$25,000 and over	1486	2.7	38
<u>Age</u>			
Younger than 25	494	1.3	6
25-34	1622	3.0	40
35-44	1067	2.1	24
45-54	786	0.8	9
55-64	691	0.5	13
65 or older	512	0.5	8
<u>Education</u>			
Less than high school	812	0.7	13
High school diploma	1919	1.4	38
Some college	1251	2.3	30
College degree	1182	1.8	19
<u>Number of Children</u>			
None	2750	1.3	47
1	911	1.5	18
2	944	2.4	22
3 or more	603	1.8	13

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TABLE 5

OWNERSHIP OF TRAVEL TRAILERS AMONG U.S. HOUSEHOLDS, 1979

	<u>Cases</u>	<u>Travel Trailers</u>	
		<u>Ownership Rate</u>	<u>Share of all Travel Trailers</u>
<u>All Families</u>	5208	2.9%	100%
<u>Number of Vehicles</u>			
1	2038	0.7	12
2	2241	4.0	54
3	633	5.3	24
4 or more	295	5.9	10
<u>Region</u>			
West	1040	4.9	33
North Central	1517	2.5	24
Northeast	982	1.9	13
South	1661	2.5	30
<u>Income</u>			
Less than \$10,000	913	2.2	18
\$10,000-14,999	881	2.1	13
\$15,000-19,999	1087	3.6	25
\$20,000-24,999	841	3.5	18
\$25,000 and over	1486	3.2	26
<u>Age</u>			
Younger than 25	494	0.6	1
25-34	1622	1.4	11
35-44	1067	3.5	19
45-54	786	3.6	24
55-64	691	5.0	31
65 or older	512	3.0	14
<u>Education</u>			
Less than high school	812	3.4	25
High school diploma	1919	3.9	51
Some college	1251	1.7	11
College degree	1182	1.9	13
<u>Number of Children</u>			
None	2750	3.2	62
1	911	2.2	15
2	944	2.4	12
3 or more	603	2.9	11

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TABLE 6

OWNERSHIP OF FOLD-DOWN CAMPING TRAILERS AMONG U.S. HOUSEHOLDS, 1979

	Cases	Ownership Rate	Fold-Down Camping Trailers Share of all Fold-Down Camping Trailers
<u>All Families</u>	5208	1.4%	100%
<u>Number of Vehicles</u>			
1	2038	0.4	9
2	2241	1.9	58
3	633	3.0	27
4 or more	295	1.4	6
<u>Region</u>			
West	1040	0.9	13
North Central	1517	1.8	38
Northeast	982	1.4	20
South	1661	1.3	28
<u>Income</u>			
Less than \$10,000	913	0.4	8
\$10,000-14,999	881	0.4	5
\$15,000-19,999	1087	1.8	26
\$20,000-24,999	841	2.4	25
\$25,000 and over	1486	2.1	36
<u>Age</u>			
Younger than 25	494	0.7	6
25-34	1622	1.1	21
35-44	1067	3.3	38
45-54	786	2.1	27
55-64	691	0.4	7
65 or older	512	0.1	1
<u>Education</u>			
Less than high school	812	1.1	16
High school diploma	1919	1.6	43
Some college	1251	1.2	21
College degree	1182	1.3	20
<u>Number of Children</u>			
None	2750	0.5	25
1	911	2.7	31
2	944	1.6	18
3 or more	603	3.7	26

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TABLE 7
OWNERSHIP OF SLIDE-IN TRUCK CAMPERS AMONG U.S. HOUSEHOLDS

	Cases	Slide-In Campers	
		Ownership Rate	Share of all Slide-In Campers
<u>All Families</u>	5208	1.8%	100%
<u>Number of Vehicles</u>			
1	2038	0.3	12
2	2241	2.1	47
3	633	3.4	21
4 or more	295	7.2	20
<u>Region</u>			
West	1040	3.6	40
North Central	1517	1.0	15
Northeast	982	1.3	13
South	1661	1.6	32
<u>Income</u>			
Less than \$10,000	913	0.8	14
\$10,000-14,999	881	2.4	26
\$15,000-19,999	1087	2.0	20
\$20,000-24,999	841	2.4	16
\$25,000 and over	1486	1.8	24
<u>Age</u>			
Younger than 25	494	0.2	1
25-34	1622	1.9	25
35-44	1067	3.2	29
45-54	786	2.0	24
55-64	691	2.2	18
65 or older	512	0.3	3
<u>Education</u>			
Less than high school	812	1.8	20
High school diploma	1919	2.2	51
Some college	1251	1.9	20
College degree	1182	1.0	9
<u>Number of Children</u>			
None	2750	1.1	38
1	911	2.7	27
2	944	1.7	15
3 or more	603	4.1	20

TABLE 8

NUMBER OF DAYS RECREATIONAL VEHICLES USED DURING LAST 12 MONTHS

Number of Days Used in Last 12 Months	Type of Recreational Vehicle					
	All Recrea- tional Vehicles	Motor- homes	Vans	Fifth Wheel & Travel Trailers	Fold-Down Camp- ing Trailers	Campers
One	22%	7%	13%	28%	33%	24%
One week or less (1-7 days)	17	14	18	16	18	20
One to two weeks (8-14 days)	13	12	7	15	14	14
Two weeks to a month (15-29 days)	10	14	9	8	9	11
One month to four months (30-119 days)	28	39	39	26	18	21
Four months or more (120 days or more)	4	4	5	3	*	7
Not ascertained	6	10	9	4	8	3
Total	100%	100%	100%	100%	100%	100%
Average number of days used	25	33	32	22	11	26
Recreational Vehicle Used for:						
Work	19%	31%	51%	4%	*	17%
Odd jobs	17	25	55	3	*	12
Transporting more people	20	36	53	*	*	16
Recreational Vehicle Used...						
More than expected	21	22	22	22	17	19
Same as expected	30	33	34	32	20	29
Less than expected	49	45	44	46	63	52
Total	100%	100%	100%	100%	100%	100%
Number of cases	528	82	94	159	80	103
Percent of weighted cases	100%	16%	18%	32%	14%	20%

less than 0.5 percent.

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TABLE 9

THE RELATIONSHIP OF ACTUAL AND EXPECTED USE OF RECREATION VEHICLES
BY OTHER TYPES OF USES

	Used:			All
	More than Expected	Same as Expected	Less than Expected	
All Recreational Vehicles	21%	30%	49%	100%
<u>Percent Who Used RV For...</u>				
Work	18%	23%	17%	19%
Odd jobs	17%	17%	18%	17%
Transporting more people	28%	22%	17%	20%
<u>Average Number of Days Used</u>	32	39	14	25

TABLE 10
USAGE PATTERNS OF RECREATIONAL VEHICLES

	Compared With Expectations, RV Was Used...		Proportion Who Use Their RV for...			Number of Days RV Used
	More	Less	Work	Odd Jobs	Transport People	
<u>All Families</u>	21	49	18	17	20	25
<u>Number of Vehicles</u>						
1	26	42	25	34	19	32
2	22	49	17	17	17	21
3	17	49	16	10	23	28
4 or more	21	55	19	19	28	27
<u>Region</u>						
West	21	46	23	19	23	26
North Central	20	47	11	15	21	26
Northeast	23	55	17	21	11	21
South	21	52	18	15	21	24
<u>Income</u>						
Less than \$10,000	21	47	15	21	9	20
\$10,000-14,999	26	51	20	19	23	18
\$15,000-19,999	27	51	14	11	20	27
\$20,000-24,999	17	56	14	17	12	27
\$25,000 and over	16	45	23	18	29	28
<u>Age</u>						
Younger than 25	*	62	37	35	20	28
25-34	21	48	30	35	34	26
35-44	19	53	11	9	17	24
45-54	23	57	14	18	15	18
55-64	23	43	16	10	21	23
65 or older	22	38	13	12	8	43
<u>Education</u>						
Less than high school	14	55	9	9	8	24
High school diploma	26	53	16	14	19	24
Some college	17	45	24	24	30	25
College degree	15	41	22	21	23	29
<u>Number of Children</u>						
None	23	46	21	15	19	27
1	13	60	14	19	22	23
2	24	43	19	25	26	26
3 or more	21	55	12	14	18	21

* Less than 0.5 percent.

TABLE 11
REPLACEMENT DEMAND FOR RECREATIONAL VEHICLES
(Percentage distribution of Recreational Vehicles)

	Type of Current Recreational Vehicle					
	All Recreational Vehicles	Motorhome	Van	Travel or Fifth Wheel Trailer	Fold-Down Camping Trailer	Camper
<u>Will Replace Present RV With</u>						
Another RV	61%	60%	64%	62%	52%	60%
Motorhome	17	44	17	12	8	11
Van	10	11	38	1	3	3
Travel or Fifth Wheel Trailer	20	3	1	42	14	18
Fold-Down Camping Trailer	5	*	2	2	25	2
Camper	7	*	3	4	1	25
Type not ascertained	2	2	3	1	1	1
Non-RV	11	14	21	6	8	12
Car	4	6	12	1	*	3
Truck	3	5	4	1	2	6
Type not ascertained	4	3	5	4	6	3
Will not replace	17	15	7	22	30	14
Not ascertained	11	11	8	10	10	14
Total	100%	100%	100%	100%	100%	100%
<u>First Recreational Vehicle</u>						
Motorhome	9%	36%	15%	1%	*	*
Van	18	19	70	4	6	5
Travel or Fifth Wheel Trailer	27	12	7	65	2	9
Fold-Down Camping Trailer	13	3	1	3	66	7
Camper	30	25	4	20	25	78
Type not ascertained	3	5	3	7	1	1
Total	100%	100%	100%	100%	100%	100%

* Less than 0.5 percent.

TABLE 12

INTENTIONS TO RENT OR PURCHASE A RECREATIONAL VEHICLE
DURING THE NEXT 12 MONTHS

a) Possibility of Renting an RV in the Next 12 Months

(Percentage distribution of Non-RV Owners)

<u>Month of Survey</u>	<u>Would Consider Renting RV</u>			<u>Total</u>
	<u>Yes</u>	<u>No</u>	<u>Not Ascertained</u>	
May	8.6	84.5	6.9	100%
June	10.8	88.0	1.2	100%
July	12.4	85.3	2.3	100%
August	8.7	88.1	3.2	100%
September	17.1	79.6	0.7	100%
October	13.1	84.7	2.2	100%
<u>All months</u>	12.0	85.1	2.9	100%

b) Possibility of Buying an RV in the Next 12 Months

(Percentage distribution of all families)

<u>Month of Survey</u>	<u>Chances of Buying RV</u>				<u>Total</u>
	<u>Probably Will Buy</u>	<u>Chances Are About Even Will Buy</u>	<u>Probably Will Not Buy</u>	<u>Not Ascertained</u>	
May	1.0	2.8	94.3	1.9	100%
June	0.8	2.9	95.9	0.4	100%
July	1.3	1.6	96.9	0.2	100%
August	1.6	2.1	95.7	0.6	100%
September	1.9	5.5	90.8	1.9	100%
October	2.1	4.6	92.3	1.0	100%
<u>All months</u>	1.4	3.2	94.5	0.9	100%

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TABLE 13
REASONS FOR NOT BUYING RV IN THE NEXT 12 MONTHS
(Percent of all families)

<u>Reasons for Not Buying^a</u>	<u>All Months</u>	<u>Month of Survey</u>				
		<u>June</u>	<u>July</u>	<u>August</u>	<u>September</u>	<u>October</u>
Purchase price	28%	31%	28%	25%	25%	34%
Economy/mileage	17	20	19	12	18	15
Performance/size/safety	1	1	1	*	3	1
Wouldn't use enough	59	52	58	62	59	52
Miscellaneous	6	5	4	6	7	8

* Less than 0.5 percent.

^aColumn percents sum to more than 100% due to possible multiple responses.

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TABLE 14

INTENTIONS TO RENT OR PURCHASE A RECREATIONAL VEHICLE
DURING THE NEXT 12 MONTHS, BY DEMOGRAPHIC SUBGROUP - 1979

	<u>Cases</u>	<u>Proportion of Households Who Intend to...</u>	
		<u>Rent</u>	<u>Buy</u>
<u>All Families</u>	5208	11.6%	4.7%
<u>Number of Vehicles</u>			
1	2038	10.4	3.5
2	2241	11.9	4.9
3	633	13.5	7.0
4 or more	295	15.8	7.1
<u>Region</u>			
West	1040	13.0	6.4
North Central	1517	11.7	4.4
Northeast	982	9.0	3.4
South	1661	12.2	4.6
<u>Income</u>			
Less than \$10,000	913	7.6	2.9
\$10,000-14,999	881	11.5	4.3
\$15,000-19,999	1087	11.6	5.2
\$20,000-24,999	841	11.9	5.9
\$25,000 and over	1486	15.6	5.6
<u>Age</u>			
Younger than 25	494	17.0	9.0
25-34	1622	16.0	6.5
35-44	1067	15.0	5.3
45-54	786	10.0	2.8
55-64	691	8.4	3.1
65 or older	512	1.7	1.0
<u>Education</u>			
Less than high school	812	5.2	4.4
High school diploma	1919	10.9	5.0
Some college	1251	14.8	5.6
College degree	1182	15.3	2.8
<u>Number of Children</u>			
None	2750	9.6	3.7
1	911	13.1	6.9
2	944	15.0	4.2
3 or more	603	15.9	7.5